

California Franchise Tax Board

Homeowner Assistance Renter Assistance & Property Tax Postponement

CALIFORNIA
FORM 9000R & INSTRUCTIONS

2000 RENTER ASSISTANCE CLAIM BOOKLET

CALIFORNIA
FORM 9000 & INSTRUCTIONS

2000 HOMEOWNER ASSISTANCE CLAIM BOOKLET

Claims must be filed after May 15
and on or before August 31.

Members of the Franchise Tax Board
Kathleen Colwell, Chair
James Kibbe, Member
S. Timothy Capps, Member

Are You Eligible?

File a claim if:

You were one of the following on December 31, 1999:

- 62 years of age or older
- Blind or
- Disabled, and

You meet all of the following requirements:

- You owned your home on your claim date on December 31, 1999.
- Your total household income for 1999 was \$14,175 or less, and
- You are a United States citizen or a permanent alien who has applied for citizenship.

2000 INFORMATION

California has two assistance programs for senior citizens, blind or disabled individuals. The Homeowner and Renter Assistance Program is administered by the Franchise Tax Board, and the Property Tax Postponement Program is administered by the State Controller's Office.

What is Homeowner and Renter Assistance?

Homeowner and Renter Assistance is an annual payment made by the State of California to qualified individuals. This payment is based upon your total household income and a portion of the property taxes that you paid on your home. Renters may also qualify for assistance as a portion of the rent is presumed to have been paid for property taxes.

Federal law, (The Personal Responsibility and Work Opportunity Reconciliation Act of 1996) requires that public assistance benefits including homeowner and renter assistance payments be distributed only to United States citizens and certain designated aliens, including qualified aliens.

To Qualify for Homeowner Assistance

- You must have owned and lived in your home on December 31, 1999.
- You must be 62 years of age or older, blind or disabled on December 31, 1999.
- Your total household income must have been \$33,993 or less in 1999.
- Your gross household income must have been \$61,806 or less for 1999. Gross household income is your total household income on line 19 of form FTB 9000, Homeowner Assistance Claim, plus all noncash business expenses such as depreciation, amortization and depletion.
- You must be a citizen of the United States, a designated alien, or a qualified alien when you file your claim. See page 19 in our Homeowner Assistance Claim Booklet (form 9000) for more information about alien statuses.

To Qualify for Renter Assistance

- You must have lived in a rented residence all or part of 1999 and paid rent of \$50 or more per month.
- You must be 62 years of age or older, blind or disabled on December 31, 1999.
- Your total household income must have been \$33,993 or less for 1999.

- Your gross household income must have been \$61,806 or less for 1999. Gross household income is your total household income on line 19 of form FTB 9000R, Renter Assistance Claim, plus all noncash business expenses such as depreciation, amortization and depletion.
- You must be a citizen of the United States, a designated alien, or a qualified alien when you file your claim. See page 19 in our Renter Assistance Booklet (form 9000R) for more information about alien statuses.

Who are household members?

Household members include you, your spouse and all other persons (except minors, students and renters) who lived in your home during 1999.

What is household income?

Household income is all income received during 1999 by all of your household members. It includes all income regardless of source or taxability.

Assistance you will receive

Homeowners - The amount of assistance is based upon your total household income. It ranges from 4% to 96% of the property taxes on the first \$34,000 of the full value of your home.

Renters - The amount of assistance is based upon your total household income. Assistance ranges from \$10 to \$240.

When and where do you file?

Homeowner and Renter Assistance claims must be filed with the Franchise Tax Board after May 15 and on or before August 31, 2000.

Claim forms and telephone assistance

Claim booklets will be available after May 15, 2000. You can request claim booklets by calling the telephone number listed on the next page under Telephone Assistance or by writing to:

TAX FORMS REQUEST UNIT
FRANCHISE TAX BOARD
PO BOX 307
RANCHO CORDOVA CA 95741-0307

When will assistance payments be mailed?

Most checks will be mailed by October 31, 2000.

Property Tax Postponement

What is Property Tax Postponement and who qualifies?

The Property Tax Postponement Program law gives qualified homeowners the option of having the State of California pay all or part of the property taxes on their homes. The amount of taxes postponed plus accrued interest generally does not need to be repaid to the state until the homeowner moves, sells the home or dies. However, any payments that you are qualified to receive from homeowner assistance claims will be applied to your postponed property taxes.

To qualify, you must be one of the following:

- 62 years of age or older,
- Blind,
- Disabled; AND

You must have a household income of \$24,000 or less (\$34,000 for those who filed and qualified in 1983.)

Filing Information

A claim form must be filed for **each year** the homeowner desires to have property taxes postponed. Individuals who qualify for postponement may also qualify for Homeowner Assistance.

Filing Period

The filing period for postponement of 2000-2001 property taxes is from May 15, 1999 through December 11, 2000.

Claim forms and telephone assistance

Claim forms or information regarding property tax postponement can be obtained by calling the State Controller's Office (toll free) at (800) 952-5661.

Toll-Free Phone Service

Our Toll-Free Phone Service is available 24 hours a day, 7 days a week for you to hear pre-recorded answers to many of your questions about Homeowner and Renter Assistance in English and Spanish. Have a paper and pencil ready to take notes.

Call: From within the United States (800) 338-0505
From outside the United States..... (916) 845-6600
Select Homeowner and Renter Assistance.

Assistance for persons with disabilities

The FTB complies with provisions of the Americans with Disabilities Act. Persons with a hearing or speech impairment call:

From voice phone..... (800) 735-2922 (California Relay Service)
From TTY/TDD.....(800) 822-6268 (Direct line to FTB customer service)

Visit the Franchise Tax Board website at: www.ftb.ca.gov

If you are calling from within the State of California about Property Tax Postponement, call the State Controller's Office (toll-free) at (800) 952-5661.